

Counsel Submitting and Utah State Bar Number  
Attorneys for  
Address  
Telephone  
E-mail Address

**IN THE UNITED STATES DISTRICT COURT  
FOR THE DISTRICT OF UTAH \_\_\_\_\_ DIVISION**

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\* **ATTORNEYS' PLANNING**  
\* **MEETING REPORT**  
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\*  
\* Case No. \_\_\_\_\_  
\* District Judge \_\_\_\_\_  
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vs.

**1. PRELIMINARY MATTERS:**

- a. The nature of the claims and affirmative defenses is:
- b. This case is \_\_\_\_\_not referred to a magistrate judge  
\_\_\_\_\_referred to magistrate judge *name of magistrate judge*  
\_\_\_\_\_under 636(b)(1)(A)  
\_\_\_\_\_under 636(b)(1)(B)
- c. Pursuant to Fed. R.Civ.P. 26(f), a meeting was held on *specify date* at *specify location*.  
The following were in attendance:  
*name of attorney, counsel for name of party*  
*name of attorney, counsel for name of party*
- d. The parties \_\_\_\_\_ request / \_\_\_\_\_ do not request an initial pretrial scheduling conference with the court prior to entry of the scheduling order. An initial pretrial scheduling conference is set before Magistrate Judge \_\_\_\_\_ on \_\_\_\_\_, 20\_\_\_\_, at \_\_\_\_\_. m.
- e. The parties \_\_\_\_\_ have exchanged or \_\_\_\_\_ will exchange by \_\_\_/\_\_\_/\_\_\_ the initial disclosures required by Rule 26(a)(1).

- f. Pursuant to Fed. R. Civ. P. 5(b)(2)(D), the parties agree to receive all items required to be served under Fed.R.Civ.P. 5(a) by either (i) notice of electronic filing, or (ii) e-mail transmission. Such electronic service will constitute service and notice of entry as required by those rules. Any right to service by USPS mail is waived.

2. **DISCOVERY PLAN:** The parties jointly propose to the court the following discovery plan:

*Use separate paragraphs or subparagraphs as necessary if the parties disagree.*

- a. Discovery is necessary on the following subjects: *Briefly describe the subject areas in which discovery will be needed.*
- b. Discovery Phases.  
*Specify whether discovery will (i) be conducted in phases, or (ii) be limited to or focused upon particular issues. If (ii), specify those issues and whether discovery will be accelerated with regard to any of them and the date(s) on which such early discovery will be completed.*
- c. Designate the discovery methods to be used and the limitations to be imposed.
- (1) *For oral exam depositions, (i) specify the maximum number for the plaintiff(s) and the defendant(s), and (ii) indicate the maximum number of hours unless extended by agreement of the parties.*
- Oral Exam Depositions
- Plaintiff(s) \_\_\_\_\_
- Defendant(s) \_\_\_\_\_
- Maximum no. hrs. per deposition \_\_\_\_\_
- (2) *For interrogatories, requests for admissions, and requests for production of documents, specify the maximum number that will be served on any party by any other party.*
- Interrogatories \_\_\_\_\_
- Admissions \_\_\_\_\_
- Requests for production of documents \_\_\_\_\_
- (3) *Other discovery methods Specify any other methods that will be used and any limitations to which all parties agree.*
- d. Discovery of electronically stored information should be handled as follows: *Brief*

*description of parties' agreement.*

- e. The parties have agreed to an order regarding claims of privilege or protection as trial preparation material asserted after production, as follows: *Brief description of provisions of proposed order.*

**3. AMENDMENT OF PLEADINGS AND ADDITION OF PARTIES**

- a. The cutoff dates for filing a motion to amend pleadings are: *specify date*  
Plaintiff(s) \_\_\_/\_\_\_/\_\_\_ Defendant(s) \_\_\_/\_\_\_/\_\_\_
- b. The cutoff dates for filing a motion to join additional parties are: *specify date*  
Plaintiff(s) \_\_\_/\_\_\_/\_\_\_ Defendants(s) \_\_\_/\_\_\_/\_\_\_

**(NOTE: Establishing cutoff dates for filing motions does not relieve counsel from the requirements of Fed.R.Civ.P. 15(a)).**

**4. EXPERT REPORTS**

- a. Reports from experts under Rule 26(a)(2) will be submitted on: *specify dates*  
Plaintiff(s) \_\_\_/\_\_\_/\_\_\_  
Defendant(s) \_\_\_/\_\_\_/\_\_\_  
Counter reports \_\_\_/\_\_\_/\_\_\_

**5. OTHER DEADLINES**

- a. Discovery cutoff: Fact \_\_\_/\_\_\_/\_\_\_ Expert \_\_\_/\_\_\_/\_\_\_
- b. (*optional*) Final date for supplementation of disclosures under Rule 26 (a)(3) and of discovery under Rule 26 (e) \_\_\_/\_\_\_/\_\_\_
- c. Deadline for filing dispositive or potentially dispositive motions and Daubert motions is \_\_\_/\_\_\_/\_\_\_

**6. ADR/SETTLEMENT:**

*Use separate paragraphs/subparagraphs as necessary if the parties disagree.*

- a. The potential for resolution before trial is: \_\_\_ good \_\_\_ fair \_\_\_ poor
- b. This case should be referred to the court's alternative dispute resolution program for arbitration: \_\_\_ mediation: \_\_\_

- c. The case should be re-evaluated for settlement/ADR resolution on:  
*specify date* \_\_\_/\_\_\_/\_\_\_

**7. TRIAL AND PREPARATION FOR TRIAL:**

- a. The parties should have \_\_\_\_\_ days after service of final lists of witnesses and exhibits to list objections under Rule 26(a)(3) (if different than 14 days provided by Rule).
- b. This case should be ready for trial by: *specify date* \_\_\_/\_\_\_/\_\_\_  
Specify type of trial: Jury \_\_\_\_\_ Bench \_\_\_\_\_
- c. The estimated length of the trial is: *specify days* \_\_\_\_\_

\_\_\_\_\_  
Signature and typed name of Plaintiff(s) Attorney

Date: \_\_\_/\_\_\_/\_\_\_

\_\_\_\_\_  
Signature and typed name of Defendant(s) Attorney

Date: \_\_\_/\_\_\_/\_\_\_

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**NOTICE TO COUNSEL**

The Report of the Attorney Planning Meeting should be completed and filed with the Clerk of the Court thirty days before the date of the Initial Pretrial Conference. A copy of the Proposed Scheduling Order on the court's official form should be submitted in word processing format by email to [ipt@utd.uscourts.gov](mailto:ipt@utd.uscourts.gov). If counsel meet, confer, and

- (i) file a stipulated Attorney Planning Meeting Report and
  - (ii) email a draft scheduling order in word processing format by email to [ipt@utd.uscourts.gov](mailto:ipt@utd.uscourts.gov)
- 30 days before the scheduled hearing, the Court will consider entering the Scheduling Order based on the filed Attorney Planning Meeting Report.

If the Hearing is held, counsel should bring a copy of the Attorney Planning Meeting Report to the Hearing.

In CM/ECF, this document should be docketed as Other Documents - Attorney Planning Meeting.

